

PERSONAL TAX RETURN INFORMATION CHECKLIST

Name _____ SS# _____ Date of Birth __/__/__

Spouse _____ SS# _____ Date of Birth __/__/__

Address _____

Phone home _____ email _____
 work _____ cell _____

Children	Name	SS#	Date of Birth
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Please provide documentation for the following:

Income

- W2s
- 1099s (misc., retirement, interest, dividend)
- Capital gain/loss statements (must reflect basis in securities sold)
- Rental Income
- Social Security statements
- State refund statement
- Self-employment income

Deductions

- Medical expenses (prescription drugs, doctors/hospital expense, insurance premiums)
- Taxes (real estate, ad valorem, personal property tax)
- Mortgage interest statement
- Non-reimbursed business expenses
- Closing statements for home sale/purchase and refinancing
- Donations (verification letters if applicable, Goodwill type receipt must have amount)
- Childcare (need tax identification number and name of provider)
- Education verification (college verification 1098-T, personal expense)
- Rental expenses for rental properties
- Self-employment expenses
- Mileage, entertainment expenses (must have verification)

Other

- Energy related purchases
- Health Savings Account Contributions and Expenses Paid
- IRA contributions
- Student Loan Interest
- Alimony
- Moving Expenses

Please include anything else you think might be pertinent to your tax situation.